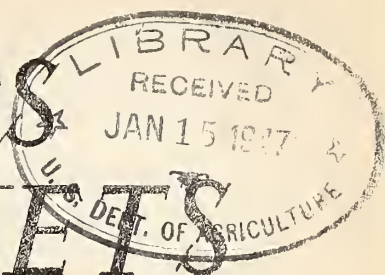


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FOREIGN CROPS and MARKETS



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L A T E C A B L E S

British Ministry of Food announces amount which can be spent for weekly meat ration increased to 1s.2d. (23 cents) for adults (formerly 20 cents for past 3 months) and 7d. (12 cents) for children, effective July 7. Increase made possible by exceptionally large quantities of frozen meat arriving from Southern Hemisphere in past few weeks. Ministry believes that increased imports together with expected home produced supply will enable meat ration to be maintained on the new level for some time without any reduction of reserves in cold storage in the country. There will be no increased issue of meat to caterers.

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New Zealand cattle entering winter (June-August) in good condition with farms well stocked with winter fodder. Butter graded for export first 10 months of season (August through May), 307 million pounds, an increase of 5 percent above preceding season; with quantity in store on May 31 totaling 69 million pounds, or the same as a year earlier. Cheese gradings same period, 258 million pounds, an increase of 26 percent. Stocks in store on May 31 totaled 29 million pounds against 54 million a year earlier.

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China 1941 wheat production revised upward to 720 million bushels, or about 20 million bushels more than the 1940 estimate, partly because of better yields than anticipated in central and west China.

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An agreement consummated on June 16, 1941, between the British and Brazilian Governments, provides for purchase by the British Government of £1,000,000 (\$4,025,000) of Brazilian cotton. The agreement involves roughly 125,000 bales of cotton.

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G R A I N SARGENTINE GRAIN BOARD LIBERALIZES
CORN-PURCHASING REQUIREMENTS . . .

With exports of Argentine corn practically at a standstill since the opening of the 1941-42 marketing season, the Grain Board, in conjunction with the Ministry of Agriculture, recently made several changes in the regulations under which the Government will make purchases of the 1940-41 corn. It was announced last April that the new crop would be purchased by the Grain Board at the same basic price paid for the 1939-40 crop, but purchases were limited to ear corn stored on farms in cribs built according to Government instructions. Early in June it was decided that the Board would purchase all the corn in cribs offered for sale by the farmers without making the deductions previously provided for covering consumption and seed. At the same time, it was also decided that the maximum limit of 10 percent for weeviled grains would be canceled and all offers would be accepted unless the proportion of grain affected by weevile was outstandingly high, in which cases special regulations would be adopted.

The appointment of a subcommittee was approved to take charge of all matters pertaining to the domestic utilization of corn. The price of 1.00 peso per metric ton (27 cents per short ton) was established for old-crop (1939-40) corn, still held by the Board, unshelled, and on farms, for sales to fuel importers and direct consumers. In this connection, it is of interest to note a recent report which states that the National Fuel Committee had been empowered to fix the amount of corn which each importer of fuel would be required to purchase per ton of fuel imported. In order to stimulate domestic utilization still further, and at the same time save the limited supply of coal in the country, railways are said to be buying corn at 6.00 pesos per metric ton (\$1.62 per short ton) placed in station. While this price will be attractive to those farmers only who live less than 6 miles from a station, because of the expense of cartage and loading, it is expected to move some quantities from storage.

Trade reports indicate that corn sales for fuel have been quite substantial in recent weeks but that they are unlikely to reduce materially the huge surplus in the country. The corn carried over from the 1939-40 crop, however, is deteriorating rapidly, it is officially reported. Shelling has practically ceased; the farmers prefer to use it on the cob for cattle feed or to sell it for fuel. Most of the old stocks are in central Cordoba or southern Santa Fe, it is said, and in some cases they are entirely affected by weevils, which, no longer checked by cold weather, increased rapidly during the warm damp days experienced in May. A large amount of molded, decayed, and bleached grain is also said to be present in these sections.

In addition to the damage to old corn, the Ministry of Agriculture reported early in June that much of the 1940-41 crop was also affected by

weevils, particularly in the Provinces of Santa Fe and Cordoba. Yields were reported, however, to be excellent in the former Province and satisfactory in the latter. In Buenos Aires, where weevils were less prevalent, high yields have been obtained in some sections, but excessive rainfall earlier in the season damaged the crop in central and eastern parts of the Province.

Although much Argentine corn has undoubtedly been lost or damaged and considerable quantities have been utilized for various purposes within the country, official estimates of the surplus available for export continue to be in the neighborhood of 475 million bushels. Only about 150,000 bushels were shipped out in April and May, and it is doubtful if total exports during the first quarter of the current season will reach 200,000 bushels, whereas some 30 million bushels were exported during April-June of last season. The corn movement from Argentina is normally heavier during July-December than in the first and last quarters of the marketing year, but with imports into the United Kingdom restricted and the markets of continental Europe closed, there appears to be little prospect for the usual seasonal trend.

ARGENTINA: Exports of corn, marketing years,
April-March, 1936-37 to 1941-42

| Month | 1936-37 | 1937-38 | 1938-39 | 1939-40 | 1940-41 | 1941-42 |
|---------------|---------|---------|---------|---------|---------|---------|
| | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | bushels | bushels | bushels | bushels | bushels | bushels |
| April | 16,903 | 30,488 | 1,898 | 12,023 | 12,795 | 85 |
| May | 18,727 | 35,553 | 6,158 | 17,180 | 11,114 | 63 |
| June | 17,211 | 34,341 | 9,370 | 20,320 | 5,468 | - |
| July | 21,446 | 31,766 | 12,332 | 16,672 | 4,151 | - |
| August | 29,098 | 31,103 | 12,988 | 10,114 | 5,900 | - |
| September ... | 44,908 | 34,449 | 17,422 | 11,206 | 1,824 | - |
| October | 37,309 | 31,184 | 16,785 | 7,945 | 3,233 | - |
| November ... | 38,398 | 23,472 | 12,713 | 6,873 | 1,634 | - |
| December ... | 35,830 | 12,908 | 9,587 | 7,221 | 3,797 | - |
| January | 40,222 | 3,759 | 6,617 | 7,994 | 5,745 | - |
| February ... | 30,308 | 791 | 5,576 | 8,390 | 3,016 | - |
| March | 21,957 | 213 | 4,075 | 7,503 | 1,620 | - |
| Total | 352,317 | 270,027 | 115,521 | 133,441 | 60,297 | a/ 148 |

Compiled from official trade statistics.

a/ 2 months only.

Final trade returns for 1940 are not yet available, but preliminary figures indicate that very little Argentine corn was exported to the United Kingdom during 1940 and no increase in takings by non-European countries was apparent. Some quantities reported "for orders," however, may have been destined largely for the British market.

ARGENTINA: Exports of corn by countries of destination,
averages 1925-1929 to 1935-1939, annual 1940

| Country of destination | Average | | | 1940 |
|---------------------------|-----------|-----------|-----------|---------|
| | 1925-1929 | 1930-1934 | 1935-1939 | a/ |
| | 1,000 | 1,000 | 1,000 | 1,000 |
| | bushels | bushels | bushels | bushels |
| United Kingdom | 43,270 | 91,922 | 87,186 | 3,487 |
| Netherlands | 24,244 | 39,846 | 28,665 | 1,944 |
| Belgium | 27,040 | 34,985 | 35,873 | 4,715 |
| Denmark | 4,000 | 9,640 | 7,508 | 423 |
| Ireland | - | 5,221 | 8,576 | 18 |
| France | 15,751 | 18,604 | 2,106 | 284 |
| Italy | 16,343 | 13,339 | 5,306 | 2,043 |
| Germany | 27,187 | 13,687 | 13,479 | - |
| Norway | 1,863 | 5,588 | 4,603 | 154 |
| Sweden | 3,216 | 6,298 | 2,570 | 214 |
| Spain | 9,717 | 6,277 | 767 | 427 |
| United States | 1,488 | 633 | 23,063 | 551 |
| Canada | 3,692 | 2,350 | 10,235 | 2,298 |
| Cuba | 537 | 43 | 2 | - |
| Japan | - | 244 | 2,881 | 81 |
| Others | 39,014 | 3,142 | 6,212 | 57,155 |
| Total | 217,362 | 251,819 | 239,032 | 73,794 |

Compiled from official trade statistics. a/ Preliminary.

BRAZIL REDUCES MIXING
PERCENTAGES OF FLOUR . . .

Under the terms of the recently concluded reciprocal trade agreement between Argentina and Brazil, the latter country agreed to make certain concessions with regard to wheat in return for similar concessions by Argentina relating to coffee. Because of the former some benefit may accrue to the United States, since they involve some relaxation in Brazil's efforts to restrict imports of wheat and flour.

Prior to the drought years of 1934-1936, the United States exported considerable quantities of wheat and flour to Brazil. Since that period, however, Brazil has been trying to increase the domestic production of wheat and develop its milling industry. Among the measures passed for these purposes was the requirement that certain percentages of domestic flours, other than wheat, be mixed with wheat flour milled for consumption in Brazil. These percentages varied from time to time depending upon the quantities of substitute flours available. In March of this year they were set at 15 percent manioc flour, 5 percent corn flour, and 3 percent rice flour, and it was announced that increases in the admixtures would

be continued until a maximum total of 30 percent was reached. Under the agreement with Argentina this decision was apparently reversed, since Brazil agreed that the total quantity of other flours to be mixed with wheat flour would be limited during the remainder of this year to 15, rather than 23 percent as above, decreased to 10 percent during 1942 and 1943, and eliminated altogether in 1944.

Wheat production in Brazil averaged about 5.5 million bushels during 1931-1935; during 1938-1939, an average of 6.5 million bushels was reported. Imports of wheat increased throughout the thirties, but the flour imports fell off. Imports of United States flour declined from 842,000 barrels in 1930 to only 66,000 in 1937, the latest year for which country data are available.

BRAZIL: Imports of wheat and flour, by principal countries
of origin, 1930-1939

| Calendar year | United States | Canada | Argentina | Uruguay | Other countries | Total |
|------------------|------------------|----------------|----------------|----------------|--------------------|----------------|
| | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| <u>WHEAT</u> | <u>bushels</u> | <u>bushels</u> | <u>bushels</u> | <u>bushels</u> | <u>bushels</u> | <u>bushels</u> |
| 1930..... | 1,007 | 205 | 21,863 | 404 | 339 | 23,818 |
| 1931..... | 4,358 | 0 | 24,886 | 0 | a/ | 29,244 |
| 1932..... | 18,457 | 0 | 9,920 | 0 | 3 | 28,380 |
| 1933..... | 2,315 | 218 | 28,683 | 18 | 0 | 31,234 |
| 1934..... | a/ | 234 | 29,344 | 165 | 13 | 29,756 |
| 1935..... | 9 | 0 | 32,361 | 4 | 23 | 32,397 |
| 1936..... | 0 | 0 | 33,571 | 213 | 15 | 33,799 |
| 1937..... | 738 | 0 | 33,423 | 40 | 0 | 34,201 |
| 1938 b/..... | - | - | - | - | - | 38,109 |
| 1939 b/..... | - | - | - | - | - | 35,525 |
| | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| <u>FLOUR</u> | <u>barrels</u> | <u>barrels</u> | <u>barrels</u> | <u>barrels</u> | <u>barrels</u> | <u>barrels</u> |
| 1930..... | 842 | 9 | 643 | 213 | 6 | 1,713 |
| 1931..... | 398 | c/ | 284 | 5 | 3 | 690 |
| 1932..... | 30 | 0 | 26 | c/ | 0 | 56 |
| 1933..... | 141 | 0 | 360 | 44 | 2 | 547 |
| 1934..... | 185 | 0 | 774 | 141 | 10 | 1,110 |
| 1935..... | 77 | 1 | 389 | 42 | 2 | 511 |
| 1936..... | 73 | 8 | 332 | 159 | c/ | 572 |
| 1937..... | 66 | 7 | 351 | 41 | c/ | 465 |
| 1938 b/..... | - | - | - | - | - | 483 |
| 1939 b/..... | - | - | - | - | - | 379 |

Comércio Exterior do Brasil.

a/ Less than 500 bushels.

b/ Preliminary totals; country data not yet available.

c/ Less than 500 barrels.

TUNISIAN WHEAT CROP BELOW EARLIER EXPECTATIONS . . .

Earlier estimates of the 1941 acreage and production of wheat in Tunisia, as reported to the Office of Foreign Agricultural Relations, have been revised downward. The crop was adversely affected, it is said, by inadequate rainfall last winter. While production is expected to be above domestic requirements, the exportable surplus will be smaller than reported last month. The barley crop was placed at 9,186,000 bushels as against 4,134,000 in 1940.

TUNISIA: Production of wheat and barley, average 1934-1938, annual 1939-1941

| Crop | Average 1934-1938 | 1939 | 1940 <u>a/</u> | 1941 <u>a/</u> |
|--------------|----------------------|---------------|----------------|----------------|
| | 1,000 bushels | 1,000 bushels | 1,000 bushels | 1,000 bushels |
| Wheat | 14,073 | 18,555 | 10,956 | 14,146 |
| Barley | 7,670 | 16,075 | 4,134 | 9,186 |

Compiled from official statistics, except as noted.

a/ Unofficial estimates based on best available information.

GRAIN STATISTICS . . .

WHEAT, INCLUDING FLOUR: Shipments from principal exporting countries, as given by current trade sources, 1938-39 to 1940-41

| Country | Total shipments 1938-39 | Shipments 1941 week ended June 14 | Shipments July 1-June 28 1939-40 | Shipments June 21-June 28 1940-41 |
|--------------------------------|-------------------------------|---|--|---|
| | 1,000 bushels | 1,000 bushels | 1,000 bushels | 1,000 bushels |
| North America <u>a/</u> | 245,296 | 209,872 | 5,231 | 5,976 |
| Argentina..... | 114,272 | 173,776 | 1,180 | 2,528 |
| Australia | 102,116 | <u>b/</u> | - | - |
| Soviet Union | 39,824 | - | - | - |
| Danube & Bulgaria <u>c/</u> .. | 52,848 | 39,616 | - | - |
| British India <u>a/</u> | <u>a/</u> 10,097 | - | - | - |
| | | | | |
| Total above | 564,453 | - | | <u>e/</u> 383,648 |
| Total European <u>a/</u> | 450,784 | | | |
| Total ex-European <u>a/</u> .. | 146,760 | | | |

Compiled from official and trade sources.

a/ Broomhall's Corn Trade News.

b/ Not available.

c/ Black Sea shipments only; no figures for current weeks.

d/ Official.

e/ North America and Argentina only.

GRAINS: Weekly average closing price per bushel, future delivery,
at leading markets, 1940-1941

| Week ended | Wheat | | | | | | Corn | | | |
|----------------------|---------|-------|----------|-------|--------------|-------|---------|-------|--------------|-------|
| | Chicago | | Winnipeg | | Buenos Aires | | Chicago | | Buenos Aires | |
| | 1940 | 1941 | 1940 | 1941 | 1940 | 1941 | 1940 | 1941 | 1940 | 1941 |
| | Cents | Cents | Cents | Cents | Cents | Cents | Cents | Cents | Cents | Cents |
| High <u>b/</u> | 109 | 104 | 84 | 71 | c/ 80 | d/ 56 | 67 | 74 | c/ 35 | 27 |
| Low <u>b/</u> | 77 | 83 | 65 | 70 | c/ 67 | d/ 55 | 61 | 68 | c/ 31 | 26 |
| July | | | | | | | | | | |
| May 31 | 83 | 96 | 68 | 70 | 69 | e/ 56 | 62 | 74 | 32 | 26 |
| June 7 | 81 | 98 | 68 | 70 | 71 | e/ 55 | 63 | 74 | 32 | 26 |
| 14 | 81 | 102 | 67 | 70 | 69 | e/ 55 | 62 | 73 | 32 | 27 |
| 21 | 78 | 100 | 65 | 70 | 69 | e/ 55 | 62 | 73 | 32 | 27 |
| 28 | 77 | 104 | 65 | 70 | 72 | e/ 56 | 61 | 74 | 32 | 27 |

Corn prices at Buenos Aires compiled from New York Journal of Commerce; all other prices from Chicago Daily Trade Bulletin. a/ Official price. b/ April 5 to June 28, 1941, and corresponding dates for 1940. c/ June and July futures. d/ July and September futures. e/ September futures.

FEED GRAINS: Movement from principal exporting countries,
June 28, 1941

| Commodity and country | Yearly exports: Shipments week ended <u>a/</u> | | | | | Exports so far reported | |
|----------------------------|--|---------|---------|---------|---------|-------------------------|------------------|
| | 1938-39 | 1939-40 | June 14 | June 21 | June 28 | July 1 to | 1939-40: 1940-41 |
| | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | b/ | b/ |
| BARLEY, EXPORTS: <u>c/</u> | bushels | bushels | bushels | bushels | bushels | bushels | bushels |
| United States..... | 11,215 | 3,532 | - | - | - | Apr. 30 | 3,457: 581 |
| Canada | 16,537 | 13,338 | - | - | - | Mar. 31 | 12,911: 1,268 |
| Argentina..... | 9,356 | 18,628 | - | - | - | May 31 | 17,432: 4,246 |
| Danube & U.S.S.R.: | 26,005 | 4,297 | 0 | 0 | 0 | June 28 | 4,147: 1,000 |
| Total | 63,113 | 39,795 | | | | | 37,947: 7,095 |
| OATS, EXPORTS: <u>c/</u> | | | | | | | |
| United States..... | 5,106 | 1,429 | - | - | - | Apr. 30 | 1,231: 1,019 |
| Canada | 13,738 | 24,330 | - | - | - | Mar. 31 | 17,220: 10,507 |
| Argentina..... | 19,379 | 27,624 | 0 | 48 | 62 | June 28 | 27,871: 4,019 |
| Danube & U.S.S.R.: | 30 | 250 | 0 | 0 | 0 | June 28 | 70: 0 |
| Total | 38,253 | 53,633 | | | | | 46,392: 15,545 |
| CORN, EXPORTS: <u>d/</u> | | | | | | Oct. 1 to | |
| United States..... | 34,369 | 44,284 | - | - | - | Apr. 30 | 26,454: 8,125 |
| Danube & U.S.S.R.: | 19,629 | 5,304 | 0 | 0 | 0 | June 28 | 4,729: 0 |
| Argentina..... | 142,869 | 87,766 | 0 | 102 | 4 | June 28 | 87,668: 19,491 |
| South Africa..... | 25,991 | 15,499 | 0 | 0 | 0 | June 28 | 14,745: 0 |
| Total | 222,858 | 152,853 | | | | | 133,596: 27,616 |
| CORN, IMPORTS: <u>d/</u> | | | | | | | |
| United States..... | 442 | 1,110 | | | | Apr. 30 | 320: 997 |

Compiled from official and trade sources. a/ The weeks shown in these columns are nearest to the date shown. b/ Preliminary. c/ Year beginning July 1. d/ Year beginning October 1.

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C O T T O N - O T H E R F I B E R S

CANADIAN COTTON MILLS

OPERATE AT FULL CAPACITY . . .

Forward orders and current-trade volume indicate that the present high level of cotton-mill activity in Canada may continue throughout 1941, according to information received in the Office of Foreign Agricultural Relations. Cotton consumption (by all mills and factories) in Canada during the 10 months August-May 1940-41 is estimated at 437,924 bales against 392,882 bales for the corresponding period in 1939-40. (For basis of estimate, see Foreign Crops and Markets, May 12, 1941.) The figures for April and May 1941 were 46,404 and 45,183 bales, respectively.

Government orders represent only about 10 percent of total output of textiles compared with 30 to 40 percent a year ago, but civilian demand has been strong enough to keep weaving mills booked about 6 months ahead. Practically all mills are making efforts to expand production through installation of additional equipment and improved plant efficiency. The taking of new orders has been suspended except on a few types of fabrics, of which limited quantities are still available from stocks. The yarn-supply situation is better except for fine counts and mills are able to accept orders for delivery in 4 to 6 weeks.

A price differential of 2.5 to 5.0 cents per pound has encouraged Canadian spinners to make heavy commitments for future deliveries of Brazilian cotton as late as October and November. It is reported that Canadian mills have ordered a 6 months' supply amounting to about 200,000 bales of Brazilian cotton and shipping facilities have been guaranteed by the Brazilian Government. Storage facilities at Boston will be available for a considerable part of it. The price difference between similar grades of American and Brazilian cotton is large enough to permit Canadian importers to pay storage charges.

Purchases of American cotton at present consist mainly of cotton with staple length of 1 inch or more for use in making tire fabrics. Imports of this type of cotton in 1941-42 are not expected to exceed 15 percent of total Canadian requirements. Imports of other grades and staples of American cotton are expected to be negligible unless shipping facilities from Brazil become inadequate. Cargo space for shipments through October, however, appear to be assured. About 3,000 bales of Peruvian cotton are reported to have been purchased for future delivery.

American middling 15/16-inch cotton (gross weight basis) was offered at Montreal on June 18, 1941, at 85 points on October quotations at New York while similar Brazilian cotton (net weight basis) was offered at about 400 points off New York prices.

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T O B A C C O

TOBACCO PRODUCTION
AND CONSUMPTION IN IRAN . . .

The Iran tobacco crop consists of two different varieties, both of which are consumed principally within the country in some form of smoking, according to information available in the Office of Foreign Agricultural Relations. During a year of normal production, about 60 percent of the Iran crop is of the Tumbeki variety, and 40 percent, oriental tobacco.

Tumbeki has small leaves with a large bare stem and a strong aroma. As it is very rich in nicotine and much too strong for cigarettes, it is used in Asia and several countries of northern Africa for smoking in the Marghileh (a kind of water-pipe in which the nicotine content is reduced by drawing the smoke through a bottle partly filled with water). Before the war, Iran was exporting 5 or 6 million pounds of Tumbeki (about half of the production) to some of the neighboring countries of Asia, and to Egypt, Tripoli, Tunisia, and Morocco, but this trade has been much reduced. Exports during the fiscal year ended March 20, 1940, amounted to less than a million pounds.

The oriental variety is grown principally in the moist plain of Gulian. Thus it is commonly referred to as Gulian tobacco. It is probably of Grecian or Turkish origin, and is used exclusively for cigarettes. This variety is of fine texture, clear yellow in color, and a little strong in flavor. Gulian tobacco does not find a ready market in foreign countries. Small quantities of the best grades have been sold in the last decade to Turkestan, Egypt, England, and in very recent years to the United States. The Monopoly is endeavoring to increase the production of Gulian tobacco and to improve its quality. Drying machines have been installed by the aid of 3-year loans from the Monopoly, and other improvements are planned.

Very little tobacco is imported into Iran. In fact, importation is forbidden in any form except by license previously obtained from the Government and the Monopoly Department. It is estimated that the consumption of leaf tobacco in Iran factories amounted to approximately 37 million pounds during the fiscal year ended March 1940. About 15.9 million pounds of this quantity were used in the manufacture of pipe tobacco; 9.2 million, in cigarettes; 6.6 million, in cigarette tobacco; and 5.3 million, in tobacco for the Marghileh.

No recent data are available concerning the total production of tobacco in Iran. The crop of 1937 amounted to about 35 million pounds and an estimate of the 1939 ~~crop~~ based on consumption and export figures would be between 35 and 40 million pounds. The area under cultivation averages about 12,000 acres.

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F R U I T S, V E G E T A B L E S, A N D N U T S

TRADE BETWEEN THE UNITED STATES
AND CANADA IN FRESH FRUITS
AND VEGETABLES 1/

During the past 15 years, the United States has supplied more than 80 percent of the fresh fruits and vegetables imported into Canada. The major portion of this movement has consisted of shipments of commodities that are not produced in Canada or those that can be shipped at a time when similar Canadian products are not available. Canada has been the most important market for American exports of fresh citrus fruits, grapes, certain berries, and minor fruits and practically all exports of fresh vegetables. With the loss, as a result of the war, of European markets, Canada remains at this time the only major outlet for American fruit and vegetable exports. In turn, Canada is the leading supplier of a number of fruit and vegetable items imported into the United States.

This study presents an analysis of the trade between the United States and Canada in fresh fruits and vegetables for the 15 years, 1925-1939, from the points of view of: (a) the value and volume of trade; (b) participation of the various States in United States exports; (c) United States producing sections affected by imports from Canada; (d) tariff policy; and (e) significance of duty reductions in the trade agreements of 1936 and 1939.

The scope of the report has been limited to an examination of the trade in fresh fruits and vegetables, partly because the trade in processed fruits and vegetables is relatively minor and partly because concessions in the trade agreements were chiefly on fresh items. Consideration of such subjects as general tariff policy likewise has been limited to examination of their application to the trade in the fresh commodities.

Of total United States exports of fresh fruits and vegetables to Canada, which in the 5 years, 1935-1939, averaged 15.6 million United States dollars, 73 percent consisted of fruit. Of the fruit total, citrus fruits amounted to nearly 70 percent, oranges accounting

1/ This statement is the "Summary and Conclusions" section of the report entitled Trade Between the United States and Canada in Fresh Fruits and Vegetables and the Effects of the Trade Agreements, which has just been released by the Office of Foreign Agricultural Relations. Copies of the complete report are available upon written application to the Office of Foreign Agricultural Relations, United States Department of Agriculture, Washington, D. C.

for 50 percent, lemons for 10, and grapefruit for more than 9 percent. Fresh grapes constituted the largest noncitrus fruit item in this period, followed by pears and strawberries. Lettuce, tomatoes, celery, carrots, and potatoes were the leading vegetables exported by the United States.

Estimates designed to show approximately the share which the various States in the United States have had in the Canadian market indicate that 42 States participated in the trade, with 6 States - California, Florida, Texas, Arizona, Washington, and Louisiana - providing the bulk of shipments. Generally speaking, the major portion of American exports originate in the States in the southern half of this country, which have climatic conditions and growing seasons quite dissimilar to those prevailing in Canada. For this reason, these southern States are able to ship produce which either cannot be grown in Canada, such as citrus fruits, or which can be shipped at a time of the year when similar Canadian produce is not available, as is the case of winter and spring vegetables and fruits. Thus, the major part of American fresh fruit and vegetable exports to Canada may be said to be complementary to Canadian production.

The more northern States, which market produce similar to commodities grown in Canada shortly before or during the period of the year when Canadian production is being marketed, are handicapped in that the low prices of Canadian produce together with the Canadian system of seasonal protection restrict imports at that time.

Canadian exports of fresh fruits and vegetables to the United States, averaging 2.2 million dollars in the most recent 5-year period, consisted largely of vegetables. As a group, vegetable products constituted 85 percent of the total, consisting chiefly of potatoes and rutabagas. Berries accounted for 85 percent of total fruit shipments, with minor quantities of apples also included. Apple exports, however, increased substantially in 1940.

Canadian rutabagas, it is estimated, provide about two-fifths of the United States annual commercial supply. This item, which is of a high quality, a large portion being washed and waxed, usually brings higher prices in United States markets than rutabagas of domestic origin. Imports of seed potatoes from Canada are largely used in the South which produces few potatoes for seed purposes. Arrivals of Canadian table stock represent only a very small portion of United States production and consumption, and the trade is mostly the result of local conditions near the border. Imports of Canadian blueberries (fresh and frozen) account for about one-fourth of the total United States commercial supply. Arrivals of Canadian apples are usually very small. Even the abnormally heavy volume in 1940 amounted to only one-half of 1 percent of the 1940 United States commercial crop.

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The value and volume of the fruit and vegetable trade between the United States and Canada were at a high level during the 1920's but dropped substantially after 1930 as the depression deepened and protection in both countries was intensified. United States exports averaged over 22 million dollars between 1925 and 1930 and fell to a low of 9.3 million dollars in 1933. Beginning in 1936, the value and volume of this trade increased substantially, averaging 16.4 million dollars annually in the period 1936-1939, compared with an average of 11.1 million dollars in the 1932-1935 period. On the other side, Canadian fruit and vegetable exports to the United States averaged nearly 6 million dollars yearly between 1925 and 1931 but after 1930 dropped severely, amounting to only 1.3 million dollars in 1932. Exports continued at a low level through 1935 reaching the low of 1.1 million dollars in that year. In the next several years they recovered and averaged 2.5 million dollars yearly in the period 1936-1939, an increase of more than 50 percent above the average of the 1932-1935 period. The trade level of recent years, however, has not been as high as in the pre-depression period so far as value is concerned, although the quantities in several instances have considerably exceeded the volume shipped in the 1920's.

The trade agreements of 1936 and 1939, in which substantial reductions in import charges by both countries first became effective on January 1, 1936, contributed to the recovery of the trade in both directions. This conclusion is drawn from the fact that: (a) the United States-Canadian trade in fresh fruits and vegetables declined heavily in the early 1930's under depression conditions and high import charges; and (b) the trade increased in the recovery period of the latter 1930's, under the lower import charges established in the trade agreements.

It is impossible to measure with precision the extent of the trade increase directly attributable to reductions in duties and other import charges. The trade in most of the items under consideration is confined almost exclusively to the United States and Canada, which precludes effective comparisons with trade in those items between the United States and nonagreement countries. Some increase in trade would logically follow the increased consumer-buying power associated with industrial recovery in both the United States and Canada. There is evidence, however, that the substantial expansion in the movement of items affected by the 1936 agreement resulted at least partially from the concessions granted, and that the 1939 agreement accelerated this expansion.

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CUBAN PINEAPPLE EXPORTS REACH PEAK IN MAY . . .

Exports of pineapples in crates from Cuba to the United States for the current season to the end of May totaled 744,997 crates or an increase of about 30 percent more than shipments in the comparable period in 1940, according to a report from American Consul Harold S. Tewell at Habana. Shipments of pineapples in bulk amounted to only 499,544 pounds or less than 25 percent of the movement in the previous year. Lack of rain in the western Provinces of Cuba has retarded the maturing of the avocado crop and exports were not expected to begin before the latter part of June.

CUBA: Exports of fresh fruit to the United States, May 1940 and 1941

| Fruit | May | | January-May | |
|----------------|----------------|----------------|----------------|----------------|
| | 1940 | 1941 | 1940 | 1941 |
| | : 1,000 crates | : 1,000 crates | : 1,000 crates | : 1,000 crates |
| Pineapples.... | 506 | 346 | 575 | 745 |
| | : 1,000 pounds | : 1,000 pounds | : 1,000 pounds | : 1,000 pounds |
| Pineapples.... | 1,044 | 500 | 2,376 | 500 |
| Papaya | 157 | 14 | 587 | 188 |
| Plantains..... | 422 | 397 | 1,967 | 2,397 |
| Bananas | 5 | 40 | 15 | 86 |

American consulate, Habana.

CANADIAN FRUIT AND VEGETABLE DUTY VALUATION

CANADA: Record of seasonal advanced valuation for calculating duty on imports of fruits and vegetables, 1941

| Commodity | Advanced valuation | Date established | Date cancelled | Region affected |
|-----------------|-----------------------|---------------------|-------------------|--------------------|
| | | | | |
| | : Cents per pound: | : | : | : |
| Beets | 1.0 | : May 15 | : - | : Ontario-Quebec |
| | | : June 6 | : - | : Western Canada |
| Cabbage | 0.8 | : May 15 | : - | : Ontario-Quebec |
| | | : June 3 | : - | : Western Canada |
| Carrots | 0.8 | : June 3 | : - | : Ontario-Quebec |
| | | : June 6 | : - | : Western Canada |
| Cherries..... | 3.0 | : May 30 | : - | : Western Canada |
| | | : June 5 | : - | : Ontario-Quebec |
| Green beans.... | 1.5 | : June 12 | : - | : Ontario-Quebec |
| Green peas.... | 2.0 | : June 6 | : - | : Ontario-Quebec |
| | | : June 6 | : - | : Western Canada |
| Strawberries.. | 1.6 | : May 9 | : June 20 | : Western Canada |

Compiled from reports of the Department of National Revenue, Canada.

L I V E S T O C K A N D A N I M A L P R O D U C T S

ARGENTINA RAISES

CHILLED-BEEF PRICES . . .

Several upward readjustments have been made in the prices fixed for Argentine chilled beef originally announced by the Argentine Ministry of Agriculture in January. This has been done so as to increase the average returns for all types of beef. The purchasing plan submitted by the British Government for the period January 1 to August 31, 1941, obligated that country to buy in Argentina only 50 percent of the Argentine production of superior-quality beef. Therefore, the remaining 50 percent of the chiller type of steer was destined for the preparation of canned beef as no other market was available for chilled beef.

In order to narrow the spread between prices paid by packers for the chiller-type steer regardless of whether used for chilling or canning purposes, under these new conditions, the Argentine Ministry of Agriculture fixed live-weight prices for the different types and descriptions on the basis of 26.00 centavos per kilogram, live weight (\$3.51 per 100 pounds), for all chiller-type steers, by Decree No. 82080 of January 11, 1941, and these prices became effective January 27, 1941. (See Foreign Crops and Markets, March 3, 1941, page 285.) These prices included a subsidy of 2.00 centavos per kilogram (27 cents per 100 pounds) granted by the same decree.

ARGENTINA: Fixed live-weight prices paid by packing companies for steers, effective January 27, 1941 a/

| Item | Argentine currency | | United States currency | |
|-------------------------------|-----------------------------|--------------------------------------|------------------------------|--------------------------------------|
| | At ranches | At Liniers and Rosario markets | At ranches | At Liniers and Rosario markets |
| | Centavos per kilogram | Centavos per kilogram | Dollars per 100 pounds | Dollars per 100 pounds |
| Chiller steers - | | | | |
| First grade | 28.00 | 26.00 | 3.78 | 3.51 |
| Second grade | 25.30 | 23.30 | 3.42 | 3.15 |
| Freezers - | | | | |
| Continentials, B grade ... | 23.85 | 23.00 | 3.22 | 3.11 |
| Continentials <u>b/</u> | 22.25 | 22.25 | 3.00 | 3.00 |
| Canners - | | | | |
| In central plants | 20.00 | 20.00 | 2.70 | 2.70 |
| In regional plants | 17.50 | - | 2.36 | - |

a/ According to the Decree No. 82080 of the National Meat Board of January 11, 1941, and No. 83162 of January 23, 1941.

b/ Suitable for the preparation of boneless beef for the United Kingdom.

During the first 15 days of fixed prices an analysis of sales showed that the quantity of the chiller type of cattle sold represented 60 percent instead of 50 percent of the total, while only 40 percent was used for canning so that the combined price packing houses could pay for first- and second-grade steers corresponded to 27.15 centavos per kilogram (\$3.67 per 100 pounds) including the subsidy. A Decree of March 13, 1941, No. 86624, authorized prices to be fixed on a dressed-weight basis for the different types and descriptions to correspond with 27.15 centavos per kilogram, live weight, and the Decree No. 87041 of March 20 made these prices effective.

ARGENTINA: Fixed dressed-weight prices paid by packing plants
for beef steers, effective March 20, 1941

| Item | Argentine currency | | United States currency | |
|-----------------------------------|-----------------------------|--------------------------------------|------------------------------|--------------------------------------|
| | At ranches | At Liniers and Rosario markets | At ranches | At Liniers and Rosario markets |
| | Centavos per kilogram | Centavos per kilogram | Dollars per 100 pounds | Dollars per 100 pounds |
| <u>Chiller type (sides):</u> | | | | |
| Up to 160 k.g. (353 lbs.).... | 47.13 | 46.35 | 6.36 | 6.26 |
| 161-165 k.g.(354-364 lbs.)... | 45.56 | 44.78 | 6.15 | 6.05 |
| 166-170 k.g.(365-375 lbs.)... | 43.99 | 43.21 | 5.94 | 5.84 |
| <u>Continental type (sides):</u> | | | | |
| 171-175 k.g.(376-386 lbs.)... | 42.42 | 41.64 | 5.73 | 5.62 |
| <u>Second grade(sides):</u> | | | | |
| Up to 165 k.g.(364 lbs.).... | 42.42 | 41.63 | 5.73 | 5.62 |
| 166-170 k.g.(365-375 lbs.)... | 50.85 | 40.07 | 6.87 | 5.41 |
| 171-175 k.g.(376-386 lbs.)... | 39.28 | 38.50 | 5.30 | 5.20 |
| <u>Qualities (other sides):</u> | | | | |
| 176-180 k.g.(387-397 lbs.)... | 38.10 | 37.32 | 5.15 | 5.04 |
| <u>Superior freezers (sides):</u> | | | | |
| Up to 180 k.g. (397 lbs.).... | 38.10 | 37.31 | 5.15 | 5.04 |
| <u>Continental a/</u> | 37.31 | 36.87 | 5.04 | 4.98 |
| <u>Canners:</u> | | | | |
| From north coast..... | 36.10 | 35.26 | 4.88 | 4.76 |
| Other zones..... | 34.48 | 33.64 | 4.66 | 4.54 |

Decree No. 87041, March 20, 1941.

a/ Continentals are understood to include those which may be used for boned-meat exports to the United Kingdom.

Later, as a result of the increase in shipments of chilled beef to the United Kingdom which, contrary to expectations, absorbed 100 percent of the Argentine production of high-quality steers, it was necessary to make a readjustment in the prices. It was considered that a price of 29.75 centavos per kilogram, live weight (\$4.02 per 100 pounds), was the price that could be paid the producer, without a subsidy, in accordance with the price realized for the finished product.

On this basis, by Decree No. 89293 of April 22, new live- and dressed-weight prices were fixed. The price for canners (of the chiller type) remains the same as when the basic price was established in January and the subsidy of 1.75 centavos (24 cents per 100 pounds) maintained. It was stated by the Argentine Ministry of Agriculture that the price of canners could not be increased unless a higher one could be obtained for the manufactured product. It is understood readjustments will be made from time-to-time based on international contingencies.

ARGENTINA: Fixed basic prices for all chiller steers,
effective April 22, 1941

| Item | Argentine currency | | United States currency | |
|--------------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| | Dressed-weight basis | Live-weight basis | Dressed-weight basis | Live-weight basis |
| | Centavos per kilogram | Centavos per kilogram | Dollars per 100 pounds | Dollars per 100 pounds |
| <u>Chiller type (sides):</u> | | | | |
| <u>First grade</u> | | | | |
| Up to 160 k.g. (353 lbs.).... | 53.50 | 34.00 | 7.23 | 4.59 |
| 161-165 k.g. (354-364 lbs.)... | 51.85 | 33.00 | 7.00 | 4.46 |
| 166-170 k.g. (365-375 lbs.)... | 50.27 | 32.00 | 6.79 | 4.32 |
| 171-175 k.g. (376-386 lbs.)... | 48.70 | 31.00 | 6.58 | 4.19 |
| 176-180 k.g. (387-397 lbs.)... | 47.13 | 30.00 | 6.36 | 4.05 |
| Over 180 k.g. (397 lbs.)..... | 40.85 | 26.00 | 5.52 | 3.51 |
| <u>Second grade</u> | | | | |
| Up to 160 k.g. (353 lbs.).... | 48.70 | 31.00 | 6.58 | 4.19 |
| 161-165 k.g. (354-364 lbs.)... | 47.13 | 30.00 | 6.36 | 4.05 |
| 166-170 k.g. (365-375 lbs.)... | 45.56 | 29.00 | 6.15 | 3.92 |
| 171-175 k.g. (376-386 lbs.)... | 43.99 | 28.00 | 5.94 | 3.78 |
| 176-180 k.g. (387-397 lbs.)... | 42.42 | 27.00 | 5.73 | 3.65 |
| Over 180 k.g. (397 lbs.)..... | 36.92 | 23.50 | 4.99 | 3.17 |
| | Decree of Mar. 20, 1941 | Decree of Jan. 23, 1941 | Decree of Mar. 20, 1941 | Decree of Jan. 23, 1941 |
| Superior freezers | 38.10 | 23.85 | 5.15 | 3.22 |
| Continental | 37.71 | 22.25 | 5.09 | 3.00 |
| <u>Canners:</u> | | | | |
| At central plants | a/ 36.10 | 20.00 | a/ 4.88 | 2.70 |
| | b/ 34.48 | 17.50 | b/ 4.66 | 2.36 |
| At regional plants | c/ 36.10 | - | c/ 4.88 | - |

Decree No. 89293 of April 22, 1941. a/ Northern Coast. b/ Other zones.
c/ This price is the basis for the scale of prices (live weight), according to the yield which applies to regional packing-house purchases. A scale of prices, according to dressed-weight yield has been temporarily fixed by the Argentine establishments of Bovril, Ltd., Liebig's Extract of Meat Company, Ltd., the Compania Saladeril, and the Frigorifica Argentina del Concordia, S.A., for 19 different yields, ranging from 42 to 60 percent of live weight.

* * * * *

GENERAL AND MISCELLANEOUS

GERMAN TEXTILE-PRICE CONTROL . . .

A recent official statement outlined the German Government's attitude regarding the advance of textile prices that has been considerable since the outbreak of the war. It was said that price increases in the field of textiles are the most conspicuous and the most widely criticized, not only because textiles along with foodstuffs are the most important consumption goods but also because in many cases textile-price increases have been of considerable proportion.

The official explanation of the increase in textile prices that has so far taken place enumerated three basic factors:

(a) Unavoidable price advances as a result of wartime structural changes;

(b) A tendency on the part of manufacturers and distributors to make up for the decline in the volume of turn-over; and

(c) A tendency on the part of the public to buy more expensive merchandise irrespective of pre-war purchasing habits.

Among the unavoidable factors tending to increase prices are listed the increase in the price of imported fibers and the growing substitution of more expensive German artificial fibers for cheap foreign grown raw materials, such as cotton. Transportation difficulties and war risks also account for increased overhead in the production and distribution of textiles.

With the drastic reduction of supplies for civilian purposes, the wholesale trade handling ready-to-wear articles and especially the retail trade were confronted with a severe decline in their respective turn-overs which most firms try to evade by more or less legitimate methods. The "evasion practices" include the discontinuation of cheap lines of clothing and the promotion of sales of such articles which provided a wider legal margin of profit to the retail trade, while textile wholesalers started supplying fabrics to the ready-to-wear industries that before the war were generally supplied by the mills direct. At the beginning of the war it had not been anticipated that the public would go in for better quality products.

The general purchasing trend towards higher-class articles irrespective of pre-war buying habits is largely explained by the unsatisfied purchasing power of the public. The reduction in food supplies, as well as a scarcity of many industrial consumer-goods that the public previously used to buy on a large scale, account for the fact that despite

severe taxation considerable amounts of free purchasing power are seeking to escape into alternative expenditure. The alert retail trade has been eager to take advantage of this new trend as far as possible.

To prevent the undesirable effects which the continued advance in textile prices would have on the German price structure, the Reich Price Commissioner on December 23, 1940, reduced the maximum profit margins allowed the textile retail trade. This measure was motivated by the fact that the rationing system and resulting eagerness of the public to buy eliminated the peacetime risks of the retail trade and the necessity of clearance and other special sales at substantially reduced prices.

This measure was followed by a decreed reduction in permitted wholesale profits on yarns and textiles, on March 31, 1941.

FOREIGN EXCHANGE . . .

EXCHANGE RATES: Average value in New York of specified currencies,
June 28, 1941, with comparisons a/

| Country | Monetary unit | Year 1940 | Month | | | | Week ended | | |
|---------------|---------------|-----------|--------|--------|--------|----------|------------|---------|---------|
| | | | 1939 | 1940 | 1941 | | 1941 | | |
| | | | June | June | May | June | June 14 | June 21 | June 28 |
| | | Cents | Cents | Cents | Cents | Cents | Cents | Cents | Cents |
| Argentina... | Paper peso | 29.77 | 31.22 | 29.77 | 29.77 | 29.77 | 29.77 | 29.77 | 29.77 |
| Australia b/ | Pound | 305.16 | 373.12 | 287.04 | 321.19 | 321.25 | 321.32 | 321.26 | 321.13 |
| Canada b/... | Dollar | 85.14 | 99.77 | 80.07 | 87.42 | 88.18 | 88.01 | 88.19 | 88.18 |
| China..... | Shang.yuan | 6.00 | 13.43 | 5.76 | 5.25 | 5.34 | 5.30 | 5.37 | 5.37 |
| England b/... | Pound | 383.00 | 468.24 | 360.16 | 403.10 | 403.16 | 403.23 | 403.19 | 403.04 |
| Germany..... | Reichsmark | 40.02 | 40.10 | 39.97 | 39.97 | c/ 39.97 | 39.97 | d/ | d/ |
| Italy..... | Lira | 5.04 | 5.26 | 5.04 | 5.08 | c/ 5.26 | 5.26 | d/ | d/ |
| Japan..... | Yen | 23.44 | 27.28 | 23.43 | 23.44 | 23.44 | 23.44 | 23.44 | 23.44 |
| Mexico..... | Peso | 18.55 | 19.75 | 18.37 | 20.54 | 20.53 | 20.54 | 20.54 | 20.52 |
| Sweden..... | Krona | 23.80 | 24.11 | 23.80 | 23.84 | c/ 23.84 | 23.84 | e/ | e/ |
| Switzerland.. | Franc | 22.68 | 22.55 | 22.46 | 23.20 | c/ 23.21 | 23.20 | e/ | e/ |

Federal Reserve Board.

a/ Noon buying rates for cable transfers. Denmark, France, the Netherlands, and Norway omitted, as rates are not available. The last average monthly quotations in 1940 were as follows: Denmark, March, 19.31 cents; France, June, 2.01; the Netherlands, April, 53.08; and Norway, April, 22.71 cents.

b/ In addition to the free rate there is also a fixed official buying rate: Australia, 322.80; Canada, 90.91; and England, 403.50 cents.

c/ Through June 16 only. d/ Not yet available. e/ Rate temporarily omitted.

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